Drive Date and Override

Calculate the Drive Date

The Drive Date is used to help calculate the Eligible Destruction Date of items sent to the Texas State Library for storage at the State Records Center. A Drive Date is required to calculate the Eligible Destruction Date.

Drive Date + Total Retention = Eligible Destruction Date
--or--
Eligible Destruction Date – Total Retention = Drive Date

Look to the Event Based column for the Record Series title you selected in the Record Series section in TexLinx (or in the Retention Code section of your agency's printed Records Retention Schedule (SLR105 form)) and…

…if EVENT BASED (or Retention Code) column is…	…then, the DRIVE DATE is…
AC…….......	the Close Date* for the records. Drive Date is any date between the Final Inclusive Date** and the day the Request Pickup is being submitted***.
CE…….......	December 31 of the Calendar Year of the Final Inclusive Date**. Example: Final Inclusive Date: 10/15/2014, Drive Date is 12/31/2014
FE…….......	August 31 of the Fiscal Year of the Final Inclusive Date**. (Fiscal Year = Sept. 1 to Aug. 31) Example: Final Inclusive Date: 10/15/2014, Drive Date is 08/31/2015
Empty…….......	any Close Date* between the Final Inclusive Date** and the day the Request Pickup is being submitted***.
PM…….......	any Close Date* between the Final Inclusive Date** and the day the Request Pickup is being submitted***. There is no disposal date for Permanent records but a Retention Drive Date is required in case the Retention amounts are changed in the future.
AV…….......	when the item is no longer administratively valuable. Drive Date is any Close Date* between the Final Inclusive Date** and the day the Request Pickup is being submitted***.
FFE…….......	September 30 of the Federal Fiscal Year of the Final Inclusive Date**. (Federal Fiscal Year = Oct. 1- Sept. 30) Example: Final Inclusive Date: 12/15/2014, Drive Date is 09/30/2015
LA…….......	when Life of Asset for the record has expired. Drive Date is any Close Date* between the Final Inclusive Date** and the day the Request Pickup is being submitted***.
PS…….......	when the record has fulfilled its Purpose Served. Drive Date is any Close Date* between the Final Inclusive Date** and the day the Request Pickup is being submitted***.
US…….......	when the record has been superseded. Drive Date is any Close Date* between the Final Inclusive Date** and the day the Request Pickup is being submitted***.

*Close Date is the date when records are deemed to be no longer active at your agency. The agency user determines this date.
**Final Inclusive Date is the second of the two dates you data entered in the Inclusive Date Range field.
***Instruction concerning the records' close date on the Retention Schedule might be later than the date the request is being submitted.

Do I need to click the checkbox for Override after I complete the Drive Date field?
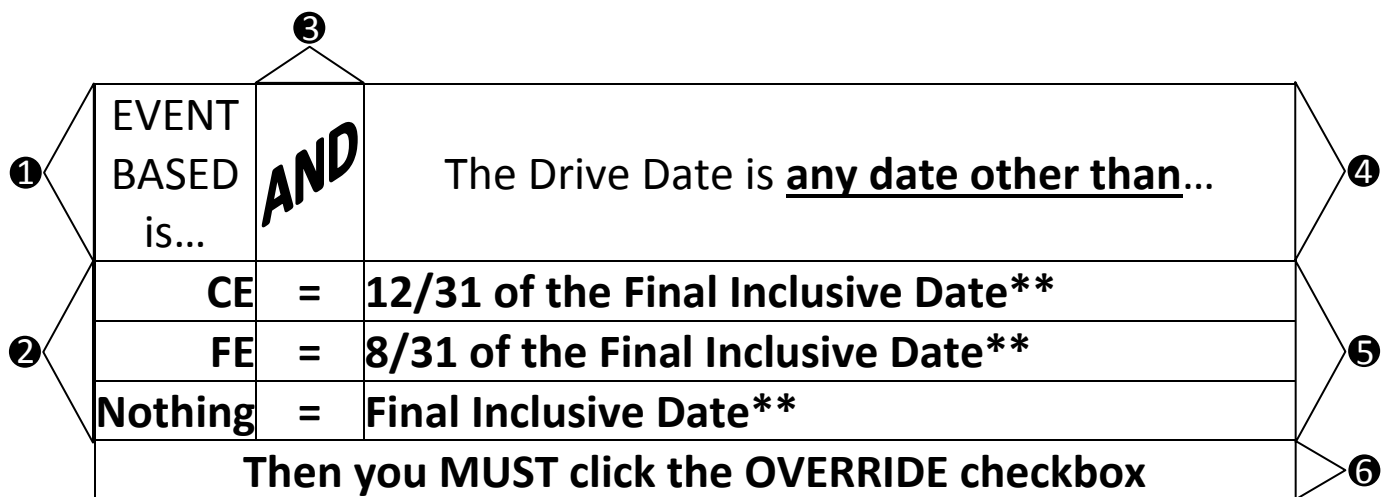
If the Event Based column in the Record Series section for TexLinx is empty or it contains CE or FE (as shown below), you might need to click the Override checkbox; otherwise, if it does not contain one of those three descriptions, **do not** click the Override checkbox and complete the rest of the data entry for the item you are creating in TexLinx.

Organization Quick Description	AIN	RSIN	Record Series Title	Event Based	Years	Months	Days	Event Trigger	Archival	Vital	Remarks	Legal Citations	Approval Status
○ Texas Big State Agency - 988	14		Leveling Enrollment & Cancellation Forms	FE	50				R		False	15-988-014	Approved
○ Texas Big State Agency - 988	15		Inventory, Annual	CE	25						False	15-988-015	Approved
○ Texas Big State Agency - 988	16		Complaint Investigations		75						False	15-988-016	Approved

However, if the Event Based column is empty or has CE or FE in it, read on…

- CE (Calendar Year End) in the Event based column results in the Drive Date being Dec. 31, the last day of the calendar year of the Final Inclusive Date**.
- FE (Fiscal Year End) in the Event Based column results in the Drive Date being Aug. 31, the last day of the fiscal year of the Final Inclusive Date**.
- An empty Event Based Column results in the Drive Date being the same as the Final Inclusive Date**.

If the Drive Date information you are using DOES NOT agree with any of the above statements, follow this chart:

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❶ EVENT BASED is…	AND	The Drive Date is **any date other than**…	❹
CE	=	12/31 of the Final Inclusive Date**	
❷ FE	=	8/31 of the Final Inclusive Date**	❺
Nothing	=	Final Inclusive Date**	
Then you MUST click the OVERRIDE checkbox			❻

**Final Inclusive Date is the second of the two dates you data entered in the Inclusive Date Range field.